# 2012 Overnight Visitor Profile Research

Strategic Marketing & Research, Inc.

# Background & Methodology

The 2012 Visitor Profile research focused on overnight visitors to Wyoming.

- The goals of the research were to:
  - Track information on visitors and trips to Wyoming, including mode of travel, accommodations, attractions and sites visited, duration of travel, and expenditures;
  - Explore where visitors come from, where they go in the state, and what they do while visiting;
  - Identify key motivators for visitation; and
  - Provide information that will assist in marketing efforts.
- An online survey was conducted among a national audience to determine incidence of travel and to gather information on visitors and their trips. The focus was on overnight trips only. For 2012, a total of 18,080 surveys were conducted. There were 560 households that reported travel to Wyoming, with some reporting multiple trips. Overall, data were gathered on 908 trips to Wyoming.
- Surveying was conducted in December 2012 to gather information on trips throughout the year. The survey was conducted in conjunction with the advertising effectiveness research to provide more data and enhanced information.

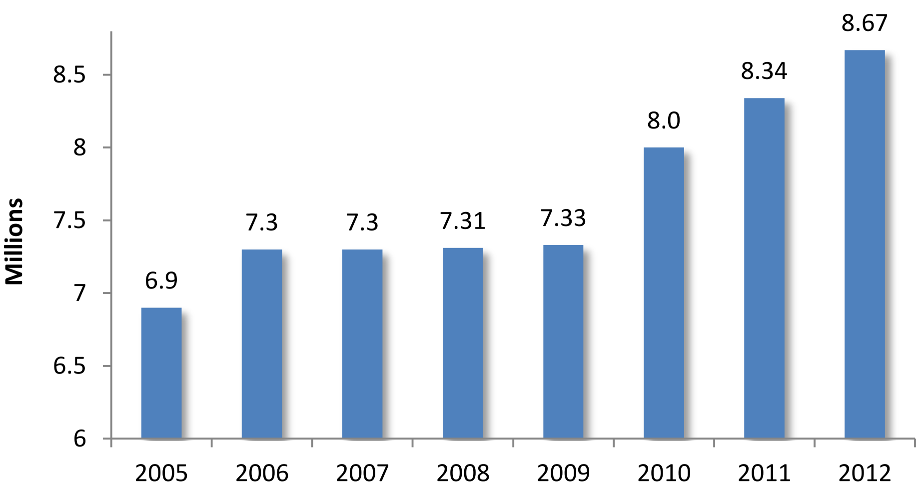
# Executive Summary

- Overnight leisure tourism continued to grow in 2012, reaching 8.67 million visitors. This represents a 4% increase in overnight leisure visitors. In fact, 2012 saw a sizable gain in marketable trip volume among new visitors, with 55% of visitors coming to the state for the first time in 5 years or more.
- These visitors are coming from farther afield than in the recent past. While Midwest states were the main 2011 origins outside the "donut" of states surrounding Wyoming, this year New York and Florida were among the top 10 most common origins for Wyoming visits.
- The Internet was an even more common source of travel information for those traveling farther than for in-state travelers.
- Air travel was at a 6-year high; more than one-third of travelers from beyond the donut flew to Wyoming.
- Almost two-thirds of Wyoming trips were planned between 2 and 6 months prior to travel, which is a longer time frame than in previous studies. This suggests a review of media timing might be in order.
- Many of the positive gains seen last year were maintained this year.

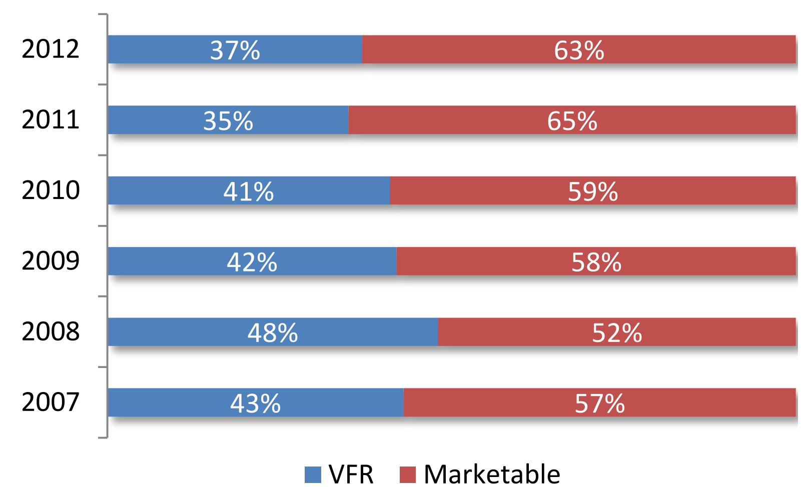
# Overnight Visitors & Trip Types

Wyoming Forever West™

- The U.S. Travel Association and Tourism Economics forecasted 2012 to be a record year in terms of the number of domestic leisure visitors, calculating a 2% increase over 2011.
- For Wyoming, overnight leisure tourism continued to grow in 2012, reaching 8.67 million visitors. This represents a 4% increase in overnight leisure visitors.

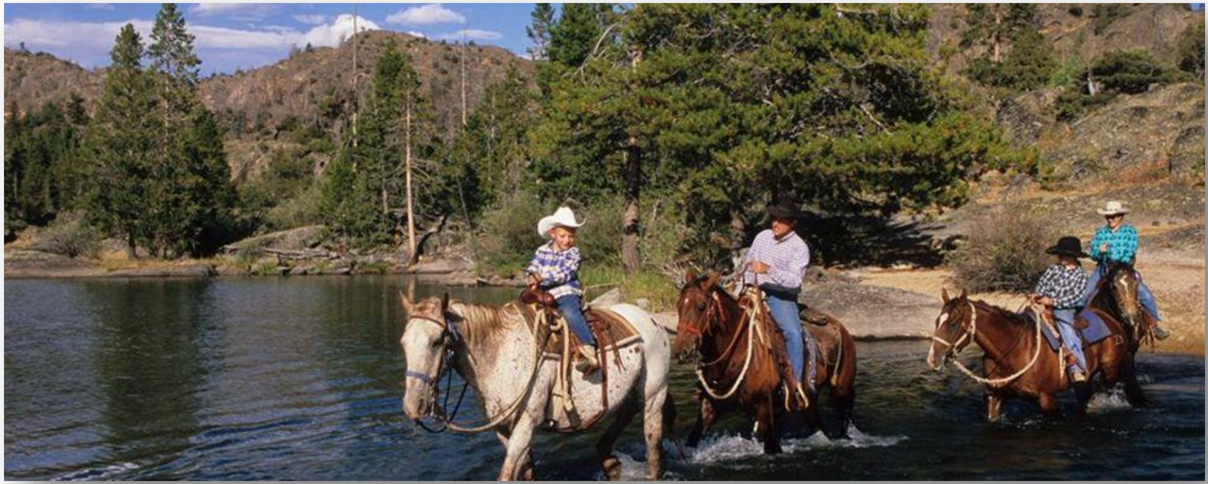



- Last year saw a significant increase in marketable trips over the prior year; 2012 travel volume remained stable.
- These findings suggest that Wyoming's marketing efforts are helping to motivate travel.



# New Visitors

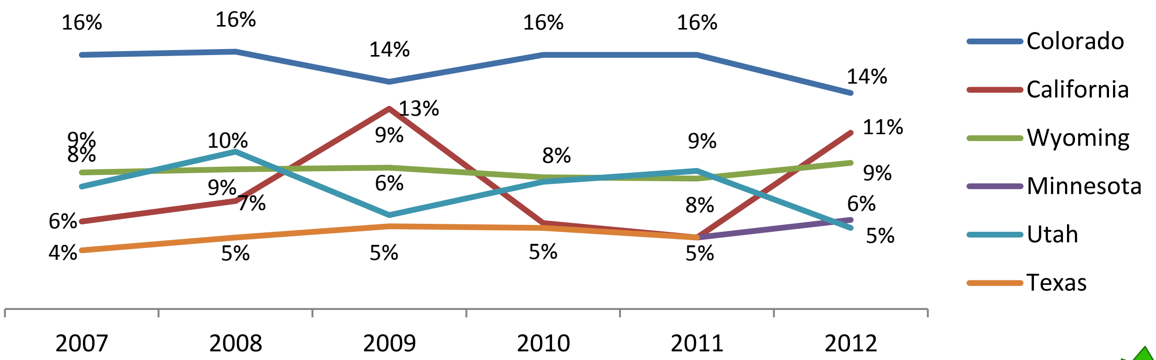
- New visitors – those who have not visited Wyoming before or whose most recent visit was more than 5 years ago – are an important part of growing the state's tourism business.
- In fact, 2012 saw a sizable gain in marketable trip volume among new visitors, with 55% of visitors coming to the state for the first time in 5 years or more. Among people outside the circle of states surrounding Wyoming, the percentage of new visitors rises to 59%, while it is only 34% among the nearby states.

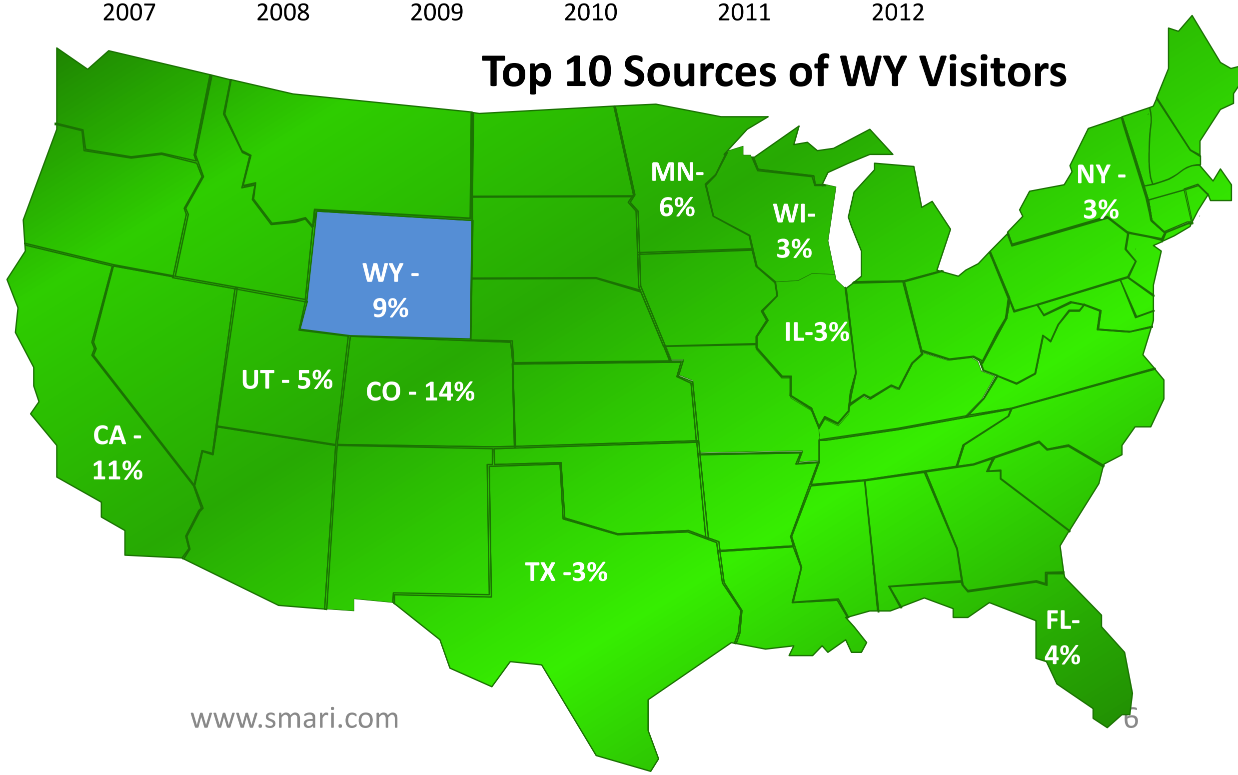


| New Visitors | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| All Overnight Trips | 39% | 30% | 35% | 34% | 36% | 49% |
| Marketable Trips | 46% | 38% | 41% | 39% | 39% | 55% |

# Visitor Origin

- The top three states for generating visitation to Wyoming have shifted somewhat. For several years Colorado, Utah and Wyoming have been the top origins of Wyoming visitors; in 2012, however, California unseated Utah with 11% of visits.
- Travel origins this year were more varied than last, with more than 60% of visitors coming from the surrounding states, Midwest, West, New York, and Florida.



# Visitor Origin

- A review of the top DMAs that generate travel shows the continued importance of Denver and Salt Lake City, which produced roughly the same percentage of marketable visits this year as last.
- Despite advertising efforts in Chicago, trip representation from this DMA fell from 4.5% to 3.0%. This was mainly due to fewer non-marketable trips (people visiting friends and family).
- By contrast, LA travel jumped from 1.8% to 5.6%.

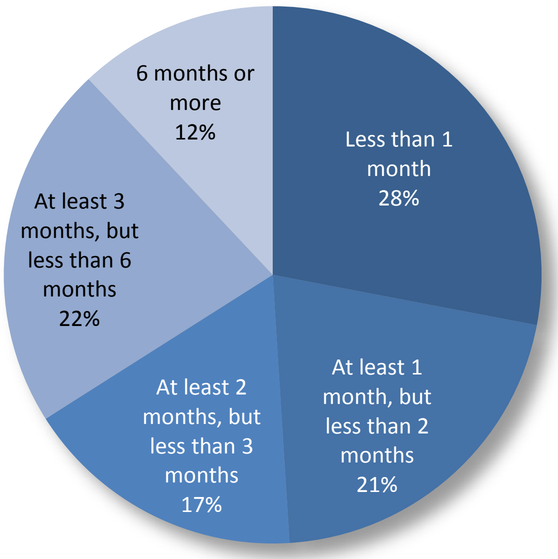
| City | % |
|---|---|
| Denver, CO | 15.1 |
| Salt Lake City, UT | 6.0 |
| Los Angeles, CA | 5.6 |
| Minneapolis-St. Paul, MN | 4.7 |
| Chicago, IL | 3.0 |
| San Francisco-Oakland-San Jose, CA | 3.0 |
| New York, NY | 2.6 |
| Boston (Manchester), MA-NH | 2.1 |
| Colorado Springs-Pueblo, CO | 1.8 |
| Detroit, MI | 1.7 |
| Miami-Fort Lauderdale, FL | 1.7 |
| Nashville, TN | 1.7 |
| Seattle-Tacoma, WA | 1.7 |
| Cheyenne-Scottsbluff, WY-NE | 1.7 |
| Rapid City, SD | 1.7 |
| Casper-Riverton, WY | 1.5 |
| Billings, MT | 1.5 |

# Planning Time Frame

- Trip planning of less than 1 month is at a 5-year low. Interestingly, so is planning of 6 months or more.
- The volume of trips planned between 2 and 6 months continues to grow, reaching 60% this year. Within that window, travelers are fairly evenly spread between 1-2 months of planning, 2-3 months, and 3-6 months.
- This has implications for the timing of Wyoming's tourism marketing efforts to various regions.

| Time Frame | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|
| Less than 1 month | 34% | 33% | 39% | 31% | 28% |
| At least 1 month, but less than 2 months | 19% | 25% | 18% | 16% | 21% |
| At least 2 months, but less than 3 months | 15% | 11% | 12% | 15% | 17% |
| At least 3 months, but less than 6 months | 15% | 18% | 14% | 25% | 22% |
| 6 months or more | 18% | 13% | 17% | 14% | 12% |

Marketable Trips



# Planning Time Frame

- As might be expected, the travel planning timeframe varies between the different geographic markets.
- In Adjacent markets 65% of trips take 2 months or less to plan, while in the Core it's only 44% that are planned in that timeframe. Chicago is probably the most interesting as they tend to plan far in advance, with over 50% being planned at least 3 months in advance.
- Obviously these differences should be considered when placing media in different markets.

| Timing | Adjacent | Core | Insert Mkts | Chicago | National |
|---|---|---|---|---|---|
| Less than 1 month | 39% | 29% | 23% | 19% | 25% |
| At least 1 month, but less than 2 months | 26% | 16% | 22% | 12% | 20% |
| At least 2 months, but less than 3 months | 14% | 24% | 16% | 13% | 19% |
| At least 3 months, but less than 6 months | 15% | 26% | 27% | 31% | 22% |
| 6 months or more | 7% | 5% | 12% | 25% | 14% |

# Information Planning Sources

- Usage of the Internet to find travel information continues to be strong, remaining steady at almost 90%. The Internet is the key source of planning for all marketable trips, even among state residents.
- Interestingly, Wyoming residents who report using *none* of these information sources jumped from 4% in 2011 to 15%. Individual chambers of commerce and 800 numbers did not see any activity from in-state residents.

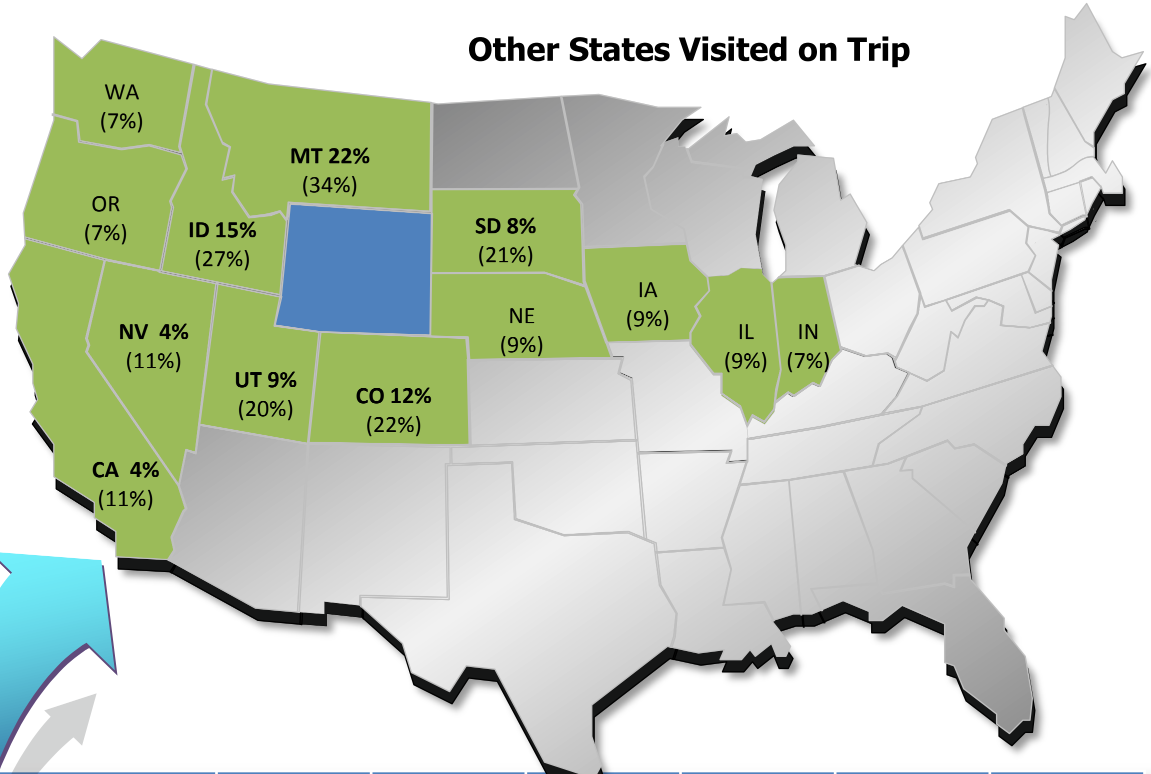
Marketable trips

| Activity | Wyoming | Donut | Remaining U.S. | Total |
|---|---|---|---|---|
| Used Internet | 78% | 89% | 90% | 88% |
| Talked to friends and family | 22% | 35% | 37% | 35% |
| Individual attraction or event to request information | 7% | 16% | 19% | 17% |
| Individual chamber of commerce to request information | 0% | 5% | 8% | 7% |
| Called 800 number to request info | 0% | 4% | 8% | 7% |
| Other | 2% | 1% | 7% | 5% |
| None | 15% | 6% | 2% | 4% |

- Despite this, the majority of travelers do use some type of information, with only 4% overall indicating that they didn't use any of these sources. Those coming from farther away use more sources and gather more information.
- Having a strong web presence continues to be a critical ingredient of success.

# Destination of Trip

- The number of visitors indicating that Wyoming was their main destination held steady at almost 60%.
- The map shows other destinations visited during marketable trips where Wyoming was the main destination. (Numbers in parenthesis show totals, whether Wyoming was the main destination or not.)
- The increase in Idaho visits points to the larger volume of traffic from California, driving through to Wyoming.




| Trip Destination | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| **Wyoming was my main destination** | 42.1% | 50.3% | 49.4% | 52.3% | 59.5% | 58.7% |
| Headed somewhere else, but included Wyoming | 14.6% | 20.8% | 25.4% | 18.0% | 20.1% | 19.9% |
| One of several places I decided to visit on this trip | 43.7% | 28.9% | 25.2% | 29.7% | 20.4% | 21.4% |

All trips.

# Mode of Transportation

- As in past years, the majority of Wyoming visitors drove; this number was down noticeably from last year. In fact, 2012's overall driving volume was at the same level as in 2008.
- Flying is at a 6-year high, with 23% of travelers coming to Wyoming via air.
- Even in-state travelers flew, whereas those coming from donut states were the most likely to drive.

| 2012 | WY | Donut | National |
|---|---|---|---|
| Car, van, truck or SUV | 87% | 95% | 68% |
| RV | 2% | 3% | 5% |
| Flew/airplane | 6% | 2% | 34% |
| Bus or motor coach trip | 2% | 0% | 3% |
| Motorcycle | 4% | 2% | 2% |
| Other | 2% | 1% | 1% |

| Mode of Transportation | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| Drove via car, van, truck or SUV | 71% | 77% | 75% | 87% | 86% | 77% |
| Flew/airplane | 20% | 15% | 21% | 9% | 8% | 23% |
| Drove via RV | 7% | 6% | 5% | 6% | 5% | 4% |
| Bus or motor coach trip | 2% | 5% | 0% | 2% | 1% | 2% |
| Motorcycle | 1% | 3% | 0% | 1% | 2% | 2% |

# Trip & Party Specifics for Marketable Trips

- The average trip length continues to approach the pre-downturn levels of 2007 and 2008.
- Interestingly, though, travel party size remains lower. Since 2010, party size has been closer to 3 than 4, with fewer travel parties including children (0-12 and/or or 13+).

| Trip Specifics | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| Average duration of trips | 3.0 | 3.1 | 2.0 | 2.6 | 2.7 | 2.9 |
| # People in travel party | 3.9 | 3.7 | 4.2 | 3.2 | 3.4 | 3.2 |
| % With children on trip | 40% | 28% | 40% | 25% | 30% | 24% |

- Compared to last year, travel parties were more likely to include younger children and less likely to include older children.
- Other family replaced friends as the second most likely travel party member after spouse/significant other.

| Travel Party | % |
|---|---|
| Spouse/significant other | 72% |
| Other Family | 25% |
| Child(ren)/Grandchild(ren): 0-12 | 21% |
| Friends/Acquaintances | 20% |
| Child(ren)/Grandchild(ren): 13+ | 9% |

# Trip Destinations for Marketable Trips

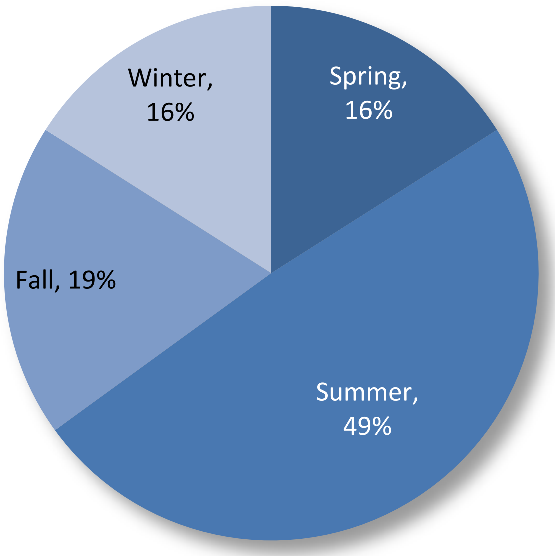
- The top destinations within Wyoming remain generally the same: Yellowstone, Grand Teton, Jackson Hole and Cheyenne.
- Visitors report an average of 3.5 different Wyoming destinations during their trips, down from 4.4 last year. As a result, some destinations saw decreases in visitation.

| Destination | 2010 | 2011 | 2012 |
|---|---|---|---|
| Yellowstone National Park | 47% | 50% | 49% |
| Grand Teton National Park | 36% | 38% | 40% |
| Jackson Hole | 33% | 38% | 37% |
| Cheyenne | 18% | 29% | 17% |
| Snake River | 13% | 15% | 15% |
| Cody | 13% | 19% | 15% |
| Casper | 14% | 20% | 14% |
| Laramie | 10% | 21% | 12% |
| Devils Tower National Monument | 13% | 18% | 9% |
| Big Horn Scenic Byway | 10% | 11% | 9% |
| Gillette | 6% | 11% | 8% |
| Big Horn Mountains | | | 7% |
| Sheridan | 7% | 16% | 6% |
| Rock Springs/Green River | 7% | 11% | 6% |
| Buffalo Bill Historical Center | | | 6% |

# Seasonality & Lodging

- As in 2011, almost half of the reported trips to Wyoming occur in the summer, with a fairly even split among the other seasons.
- Among marketable trips, most visitors use hotel/motel accommodations, although RV parks/campgrounds are also popular. Other types of accommodations are much less prevalent.
- These results are virtually identical to last year's.

| Accommodations | % |
|---|---|
| Hotel, motel, etc. | 79 |
| RV park/campground | 23 |
| Stayed w/friends & family | 8 |
| Rental home, condo, timeshare | 5 |
| Dude ranch | 3 |
| Other | 2 |



# Activities & Motivations among Marketable Trips

- Yet another consistent measure: the key activities that motivate people to choose Wyoming remain national parks, scenery and natural experiences.
- Overall, visitors report an average of 4.5 activities during their trips, which is the same as last year.
- This year's results are consistent with prior findings that niche activities, which are strong motivators for small audiences, bring visitors to Wyoming for snow sports, bicycling, hunting and attending a rodeo.

| All 2012 Trips | Participate | Motivate |
|---|---|---|
| Visiting a national park | 63% | 46% |
| Hiking or backpacking | 50% | 19% |
| Scenic drive | 53% | 15% |
| Wildlife watching | 36% | 12% |
| Camping | 24% | 9% |
| Snow skiing or snowboarding | 8% | 7% |
| Visiting historical sites | 32% | 6% |
| Visiting museums | 26% | 5% |
| Fishing | 9% | 4% |
| Sightseeing tour | 17% | 4% |
| Visiting hot springs | 13% | 3% |
| Attending a rodeo | 8% | 2% |
| Horseback riding | 6% | 2% |
| Bicycling or mountain biking | 5% | 2% |
| River rafting | 8% | 1% |
| Attending performing arts (music/theater) | 5% | 1% |
| Hunting | 1% | 1% |

# Trip Expenditures for Marketable Trips

- Total trip expenditures are almost identical to last year's, maintaining the gains seen over 2010 spending.
- Interestingly, modest spending increases occurred in key categories of lodging and transportation, the latter reflecting increased air travel even among in-state visitors. In contrast, ancillary spending such as activities and shopping actually dropped. This may be an indication that travel is once again something people are saving and planning for, which bodes well for long-term performance.

| Expenditures for… | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| Lodging | $260 | $371 | $302 | $330 | $325 | $357 |
| Meals/Food/Groceries | $154 | $192 | $207 | $173 | $189 | $178 |
| Entertainment | $101 | $88 | $111 | $61 | $98 | $108 |
| Activities | $86 | $75 | $63 | $46 | $81 | $18 |
| Shopping | $254 | $194 | $128 | $101 | $162 | $80 |
| Transportation | $202 | $207 | $146 | $182 | $210 | $343 |
| Other | $97 | $76 | $44 | $21 | $50 | $34 |
| **Total** | **$1,154** | **$1,203** | **$1,004** | **$914** | **$1,116** | **$1,118** |

# Trip Satisfaction

- Ratings of marketable trips continue to shift upward, with fewer people than last year indicating their experience was either "poor" or "fair." While "excellent" remained high, ratings moved from the lower end of the scale to "very good."
- While there is still opportunity for improvement to return the high ratings to their 2007 levels, this year's results indicate progress in that direction.

| Overall Experience | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| Excellent | 54.4% | 57.2% | 35.9% | 37.0% | 43.1% | 43.8% |
| Very Good | 29.6% | 31.0% | 43.1% | 40.7% | 29.1% | 32.5% |
| Good | 12.6% | 8.6% | 21.0% | 19.5% | 24.0% | 20.0% |
| Fair | 1.7% | 2.4% | 0% | 2.5% | 4.5% | 3.5% |
| Poor | 1.7% | 0.9% | 0% | 0.3% | 1.2% | 0.2% |

# Recommending the State

- As with many other positive measures this year, visitors' willingness to recommend Wyoming as a place to visit remained strong at 70%.
- The top 2 most recommended states remained the same, but there was quite a bit of shuffling this year with recommendations for other states.
- Despite these shifts, Wyoming's place in the ordered list remains in the middle.

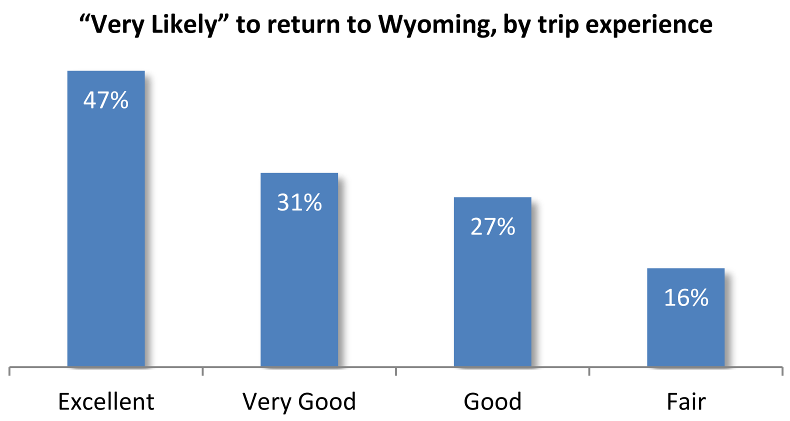
| State | Recommended 2011 | Recommended 2012 |
|---|---|---|
| Colorado | 86.1% | 86.0% |
| Oregon | 81.7% | 77.8% |
| Montana | 68.9% | 76.4% |
| South Dakota | 68.9% | 75.3% |
| Washington | 75.9% | 75.2% |
| Nevada | 73.6% | 73.1% |
| **Wyoming** | 69.1% | 70.7% |
| Utah | 70.8% | 67.7% |
| Texas | 67.1% | 63.7% |
| New Mexico | 73.5% | 61.8% |
| Idaho | 53.0% | 55.6% |
| North Dakota | | 51.6% |
| Oklahoma | 54.4% | 43.8% |
| Kansas | 52.5% | 26.4% |

# Likelihood to Visit in Next Year

- The percentage of visitors who report they are "very likely" to return to Wyoming remains above one-third, although there was no growth in this measure.
- The identically sized group who says they are "somewhat likely" to return gives impetus to the advertising campaign. Travelers have many options for their tourism dollars, and destinations must continue to present attractive opportunities.

| Likelihood | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| Very Likely | 28% | 33% | 26% | 42% | 37% | 35% |
| Somewhat Likely | 41% | 33% | 57% | 28% | 32% | 35% |
| Not Very Likely | 31% | 34% | 17% | 30% | 32% | 30% |

- One way to increase the likelihood of a return visit is to ensure that travelers have the best possible experience in the state. The graph at right shows how trip experience relates to likelihood to return.



# Visitor Demographics

- The demographic profile of visitors remains largely unchanged. The trend is toward a somewhat younger audience, and the visitors continue to be well educated and have higher and above-average household income.

| | 2007 | 2008 | 2009 | 2010 | 2011 | 2012 |
|---|---|---|---|---|---|---|
| Married | 65.7% | 62.4% | 65.7% | 65.4% | 68.6% | 62.9% |
| Not married | 34.3% | 37.6% | 34.3% | 34.6% | 31.4% | 37.1% |
| High school or less | 6.4% | 16.4% | 2.7% | 5.5% | 4.8% | 6.6% |
| Some college or tech. school | 30.9% | 40.1% | 21.1% | 23.1% | 25.3% | 22.5% |
| College graduate | 42.5% | 32.4% | 50.5% | 44.1% | 41.8% | 40.2% |
| Post-graduate degree | 20.3% | 11.1% | 25.7% | 27.3% | 28.2% | 30.8% |
| People in household | 2.6 | 2.8 | 2.7 | 2.7 | 2.8 | 2.7 |
| Income | $71,955 | $65,012 | $67,429 | $79,578 | $76,563 | $77,154 |
| Age | 50 | 46 | 40 | 46 | 40 | 40 |